PrimeroEdge

Free & Reduced Meals **Online Applications**



Cybersoft TECHNOLOGIES

www.primeroedge.com

4422 FM 1960 W • Suite 300





<u> http://facebook.com/primeroedge</u>



PrimeroEdge Food Service SolutionsPrimeroEdge Free & Reduced Meals Online Applications User Manual

Copyright © 2011 Cybersoft Technologies, Inc.

Software Version: 1.2.0.1

All rights reserved. No part of this manual shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopy, recording, or otherwise, without the written permission from Cybersoft Technologies. No patent liability is assumed with respect to the use of the information contained herein. Although every precaution has been taken in the preparation of this manual, Cybersoft Technologies assumes no responsibility for errors or omissions.

Disclaimer

Every effort has been made to make this manual as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an "as-is" basis. Changes made to the product may not be reflected in this manual.

Cybersoft Technologies shall have neither liability nor responsibility for any loss or damages arising from the use of information contained in this manual.

Table of Contents

Chapter 1: General Information	
Introduction	
Key Features	
How to use this manual	
Online Applications Procedure	
Chapter 2: Set Up Online Letter to Household	
Letter to Household	
Chapter 3: Activate Letter to Household	17
Activate Letter to Household	
Step 1: Beginning of School Year Letter to Household	
Step 2: Print Beginning of School Year Letter to Household	
Step 3: Activate Standard Letter to Household	
Chapter 4: Applicant Login	27
Accessing Free & Reduced Meals Online Applications	
Reviewing the Free & Reduced Meals Screen	29
Step1: Logging In	30
Choosing a Login Option	30
Selecting Login Option 1	30
Selecting Login Option 2	32
Selecting Login Option 3	
Reviewing the Letter to Parent Screen	33
Continuing the Process	34
Chapter 5: Add Students to Application	35
Step 2: Adding Students	36
Adding a Student	39
Handling Errors	
Adding a Foster Student	
Adding a Student with Income	
Changing Student Information	
Continuing the Process	47
Chapter 6: Add SNAP/TANF to Application	
Step 3: Adding SNAP/TANF	
Entering a SNAP/TANF Number	50
Continuing the Process	51

Cybersoft

Chapter 7: Add Household Members to Application			
Step 4: Adding Household Members			
Adding Household Members			
Changing Household Member Information	56		
Continuing the Process			
Chapter 8: Verify Applicant Information	59		
Step 5: Verifying and Reviewing	60		
Verifying Applicant Information	60		
Review Application Information	61		
Continuing the Process	62		
Chapter 9: Submit Application	63		
Step 6: Submitting the Application	64		
Verifying the Password	64		
Verifying the PasswordSubmitting the Application	66		
Chapter 10: Validate Online Applications	67		
Validate Online Applications	68		
Validating Online Applications			
Notifying Online Applicants	70		

Chapter 1: General Information

In this chapter you will learn:

- ✓ Basics about PrimeroEdge Free & Reduced Meals for online application submission
- ✓ How to use this manual

Introduction

Cybersoft Technologies created the innovative PrimeroEdge Cafeteria Solutions family of software products and services to solve the wants and needs expressed by school food services experts. PrimeroEdge Cafeteria solutions help you gain greater control of your operations by reducing expenses through productivity enhancements, ease of training and increased accuracy.

The PrimeroEdge application provides the School Food Services Department with a technology infrastructure to improve the quality of service and simplify the process of meal accounting and reporting. This versatile software addresses the challenges faced in day-to-day operations with simple to use screens and user-friendly navigation tools.

Key Features

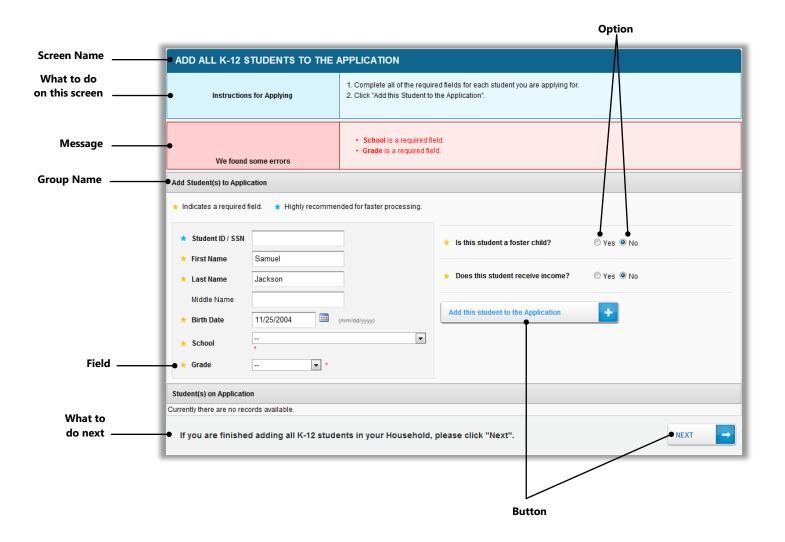
This manual reviews:

- Set up of the online Letter to Household
- Set up of the Letter to Household templates
- Six (6) step process that applicants use to complete and submit online applications with the PrimeroEdge Free and Reduced Meals web application .
- Validating online applications and notifying applicants.

How to use this manual

Icons that may be used in this manual include:

Icon	Name	What it means
②	NOTE	Additional information on the use or function of the command or topic.
A	CAUTION!	Information that is critical to the use of the function.
9	TIP	Information that may help you use the function more effectively.



West Virginia Online Applications Procedure

0

Set up Online Applications Letter to Household in Free & Reduced Eligibility Module (FRE)

Chapter 2

2

Set up Beginning of School Year & Standard Letter to Household in Free & Reduced Eligibility Module (FRE)

Chapter 3

3

Applicant completes online application(s)

Chapters 4-9

4

Validate online application(s) & notify Applicants

Chapter 10

Chapter 2: Set Up Online Applications Letter to Household

In this chapter you will learn how to:

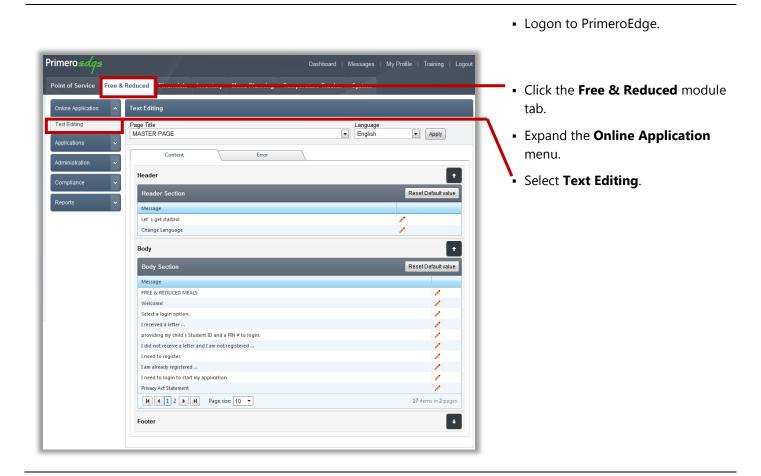
✓ Customize the online application Letter to Household

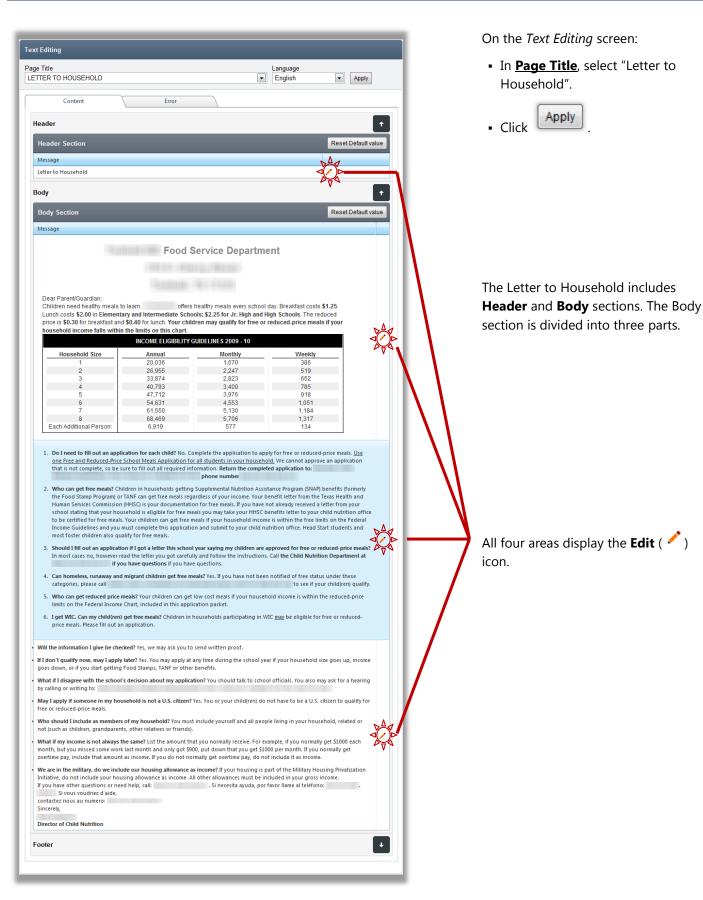
Letter to Household

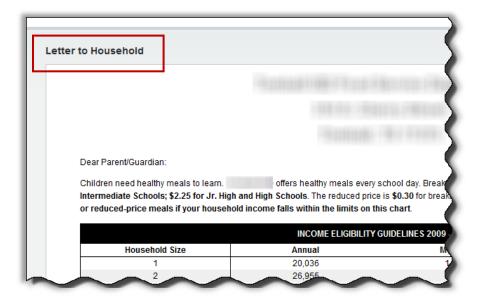
PrimeroEdge provides "default" or standard templates for several letters that are used with various functions. The standard letter includes text that you will want to change to customize the letter for use by your district.

The Free & Reduced Meals Online Applications module displays the Letter to Household after the applicant (usually parent or guardian) logs in. This letter includes the prices for full- and reduced-price meals and the eligibility guidelines for qualifying for reduced-price or free meals.

This chapter includes the steps to change selected items in the Letter to Household.

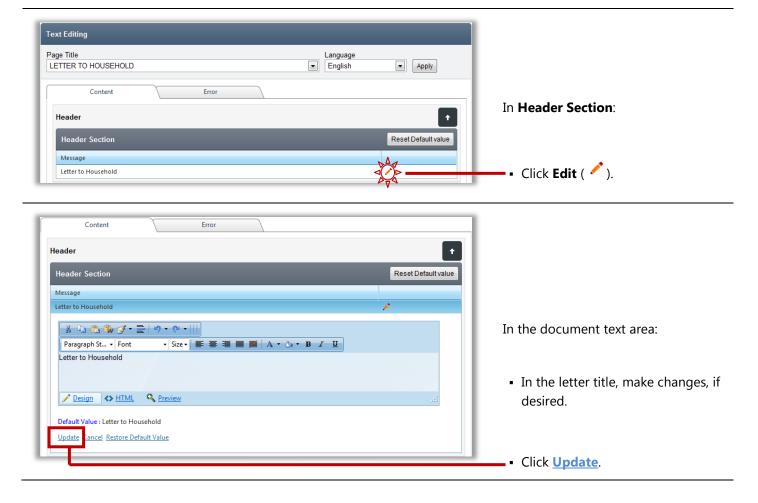


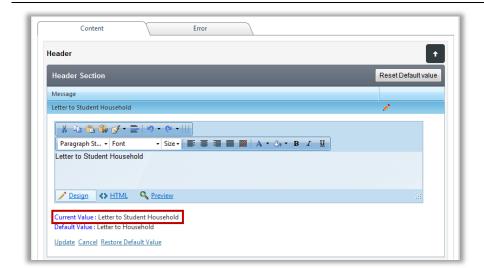




The **Header** section includes the letter title.

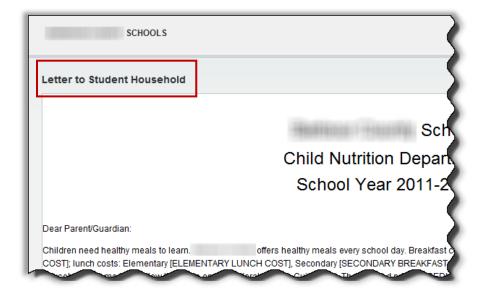
The letter title is shown on the first screen after the applicant logs into the Free & Reduced Meals Online Application.



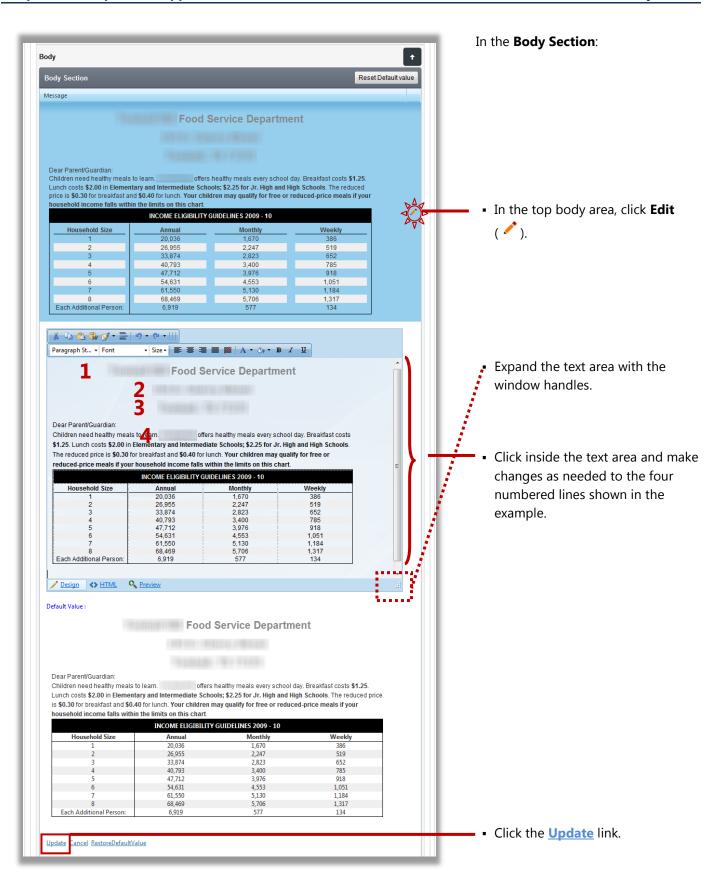


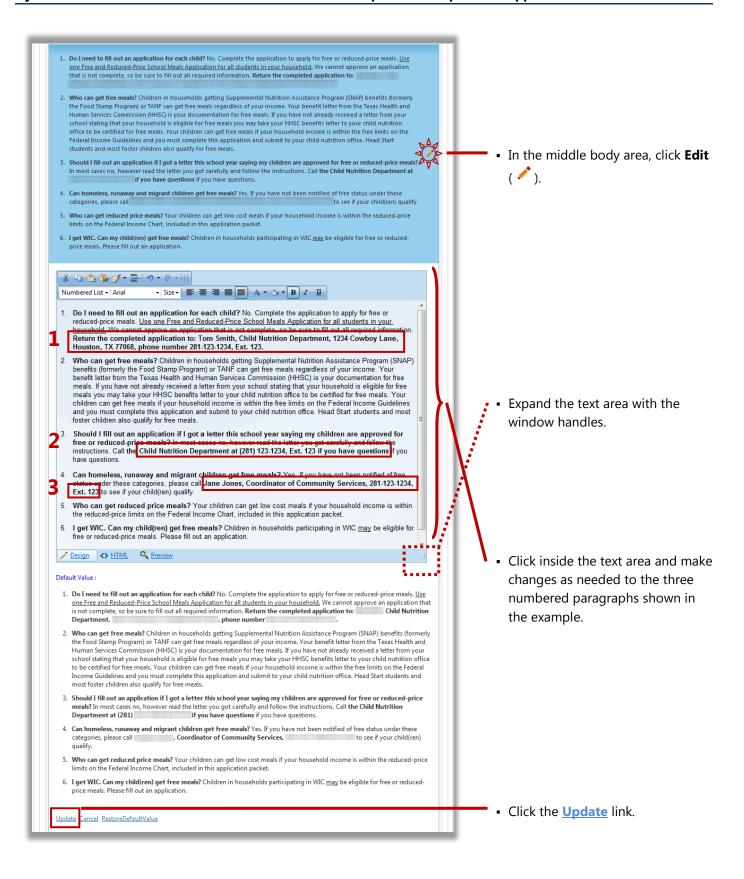
In the **Header Section**:

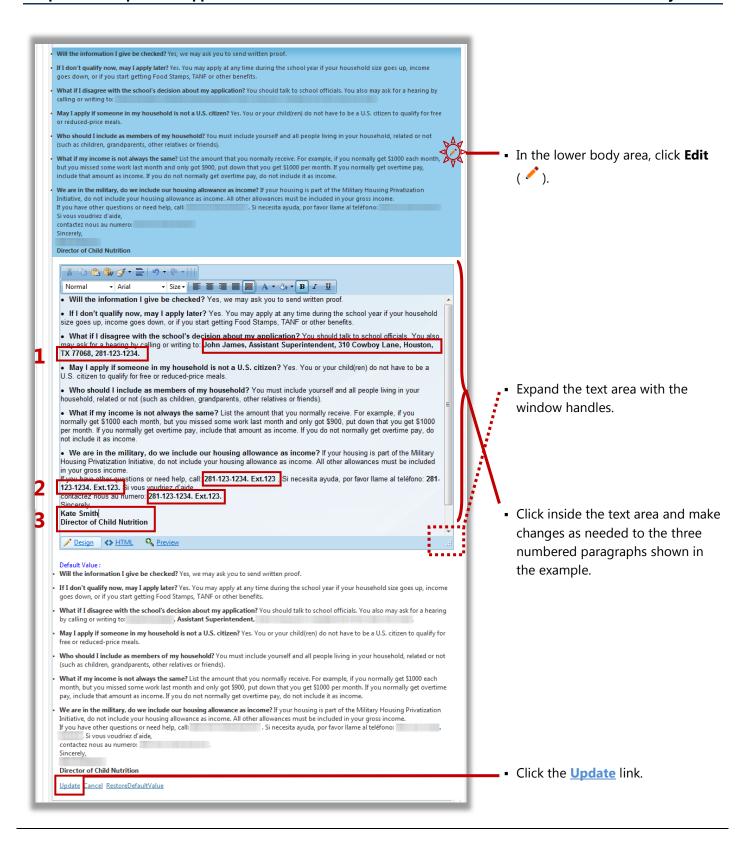
 Current Value displays what will be shown to the applicant.



The updated title as it appears to the online applicant.







Chapter 3: Set Up Letter to Household Templates

In this chapter you will learn how to:

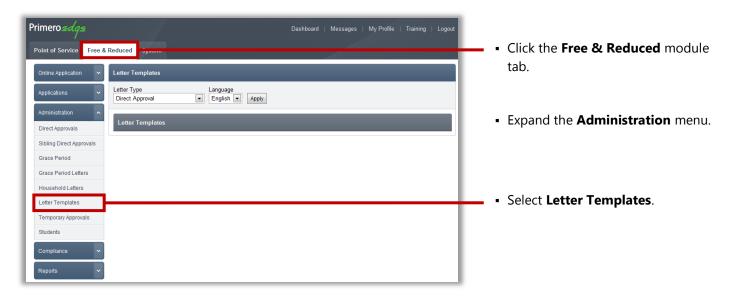
- ✓ Create the Beginning of School Year Letter to Household.
- ✓ Activate the Beginning of School Year Letter to Household.
- ✓ Print the Beginning of School Year Letter to Household.
- ✓ Active the Standard Letter to Household.

Activate Letter to Household

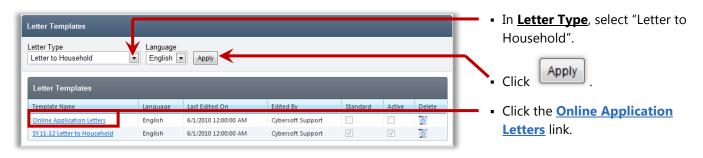
In the previous chapter, you updated the Letter to Household that is shown to the applicant when they access the Free & Reduced Meals Online Applications through the website. Next, you will:

- Step 1: Create and activate the Letter to Household that is printed and sent to all households at the beginning of the school year describing the online application process
- Step 2: Activate the Letter to Household that is printed and sent to all households throughout the school year with frequently asked questions about the application process.

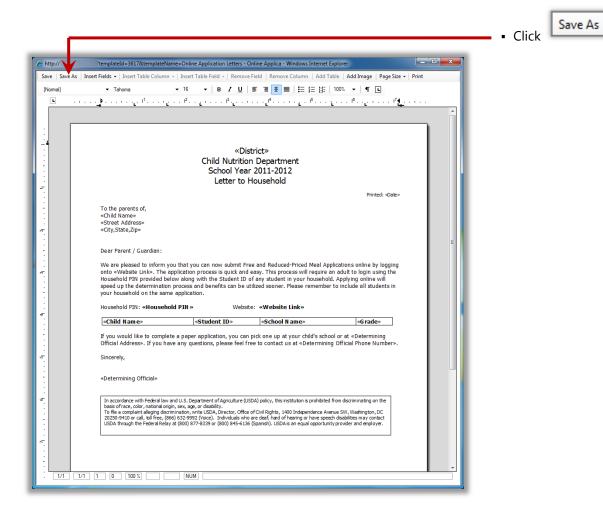
Step 1: Beginning of School Year Letter to Household

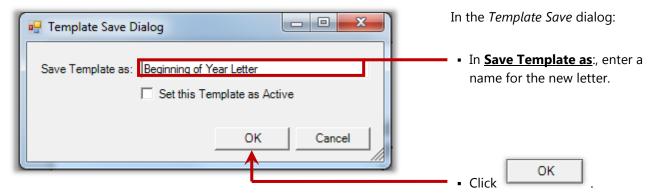


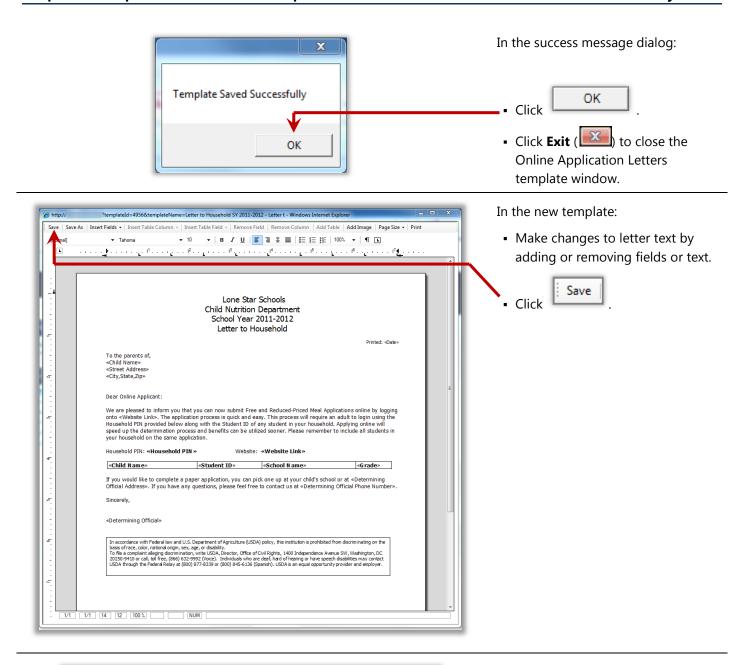
On the Letter Templates screen:



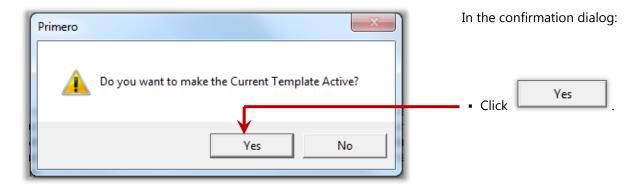
In the Template window:

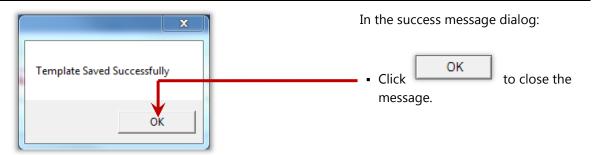


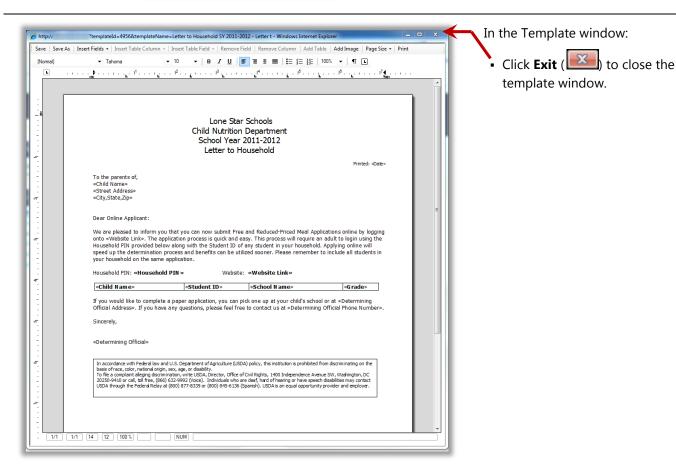




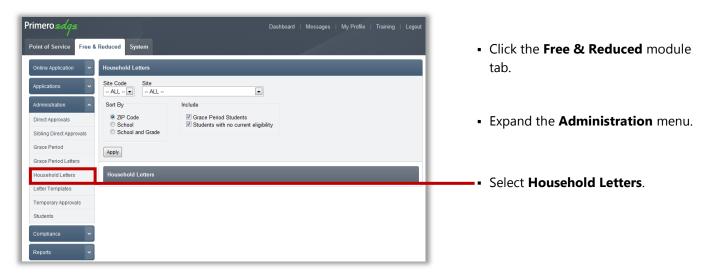


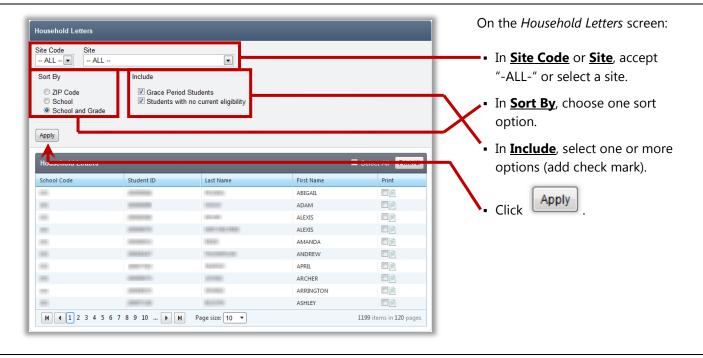


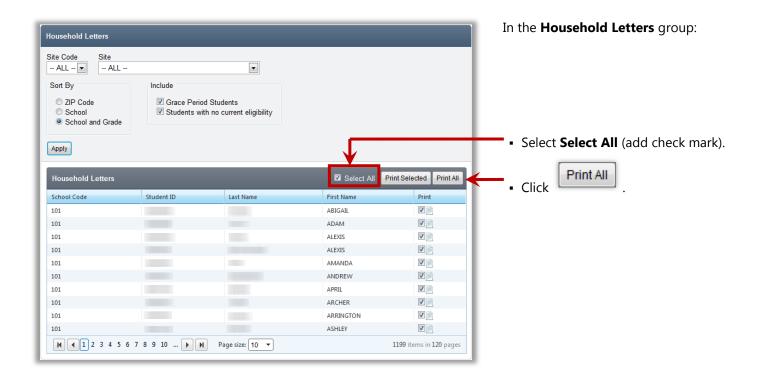




Step 2: Print Beginning of School Year Letter to Household

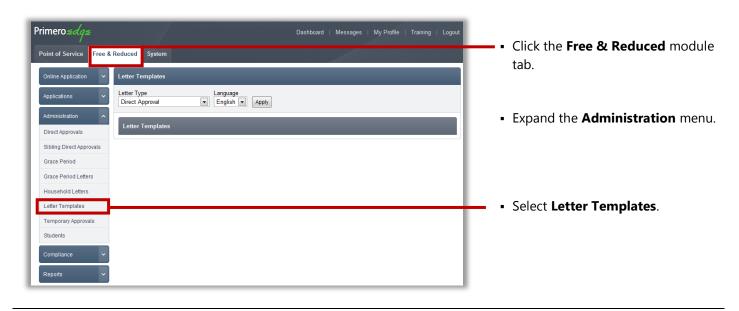


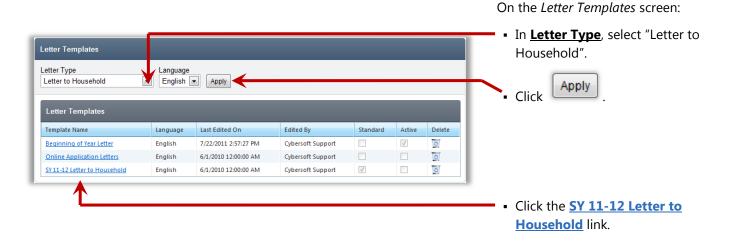




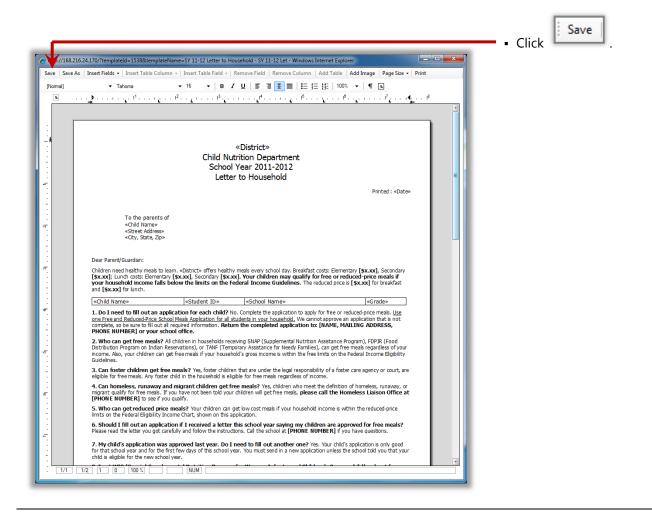
Step 3: Activate Standard Letter to Household

Activate the Standard Letter to Household Letter



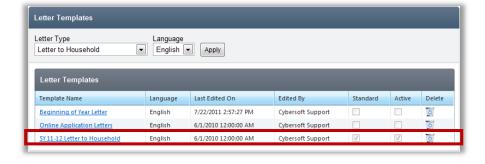


In the letter editor window:









In the Letter Templates list, <u>SY 11-12</u> <u>Letter to Household</u> is now the "Active" letter.

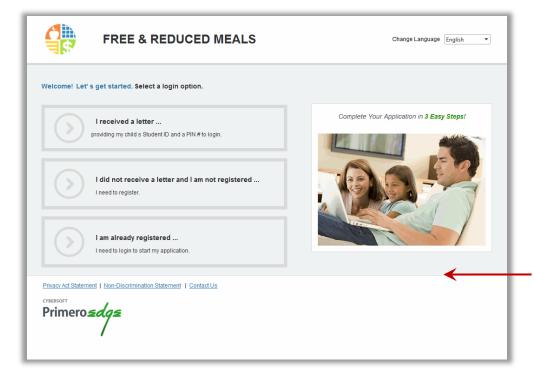


Chapter 4: Applicant Login

In this chapter you will learn how the applicant:

- ✓ Logs in to the PrimeroEdge Free and Reduced Meals Online Applications
- ✓ Views the Privacy Act Statement and Non-Discrimination Statement
- ✓ Views contact information for application support
- ✓ Registers a Username and Password in the Free & Reduced Meals Online Applications system
- ✓ Reviews Eligibility Guidelines

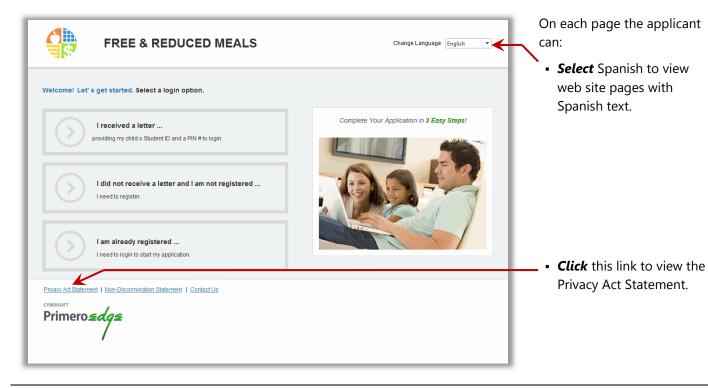
Accessing Free & Reduced Meals Online Applications

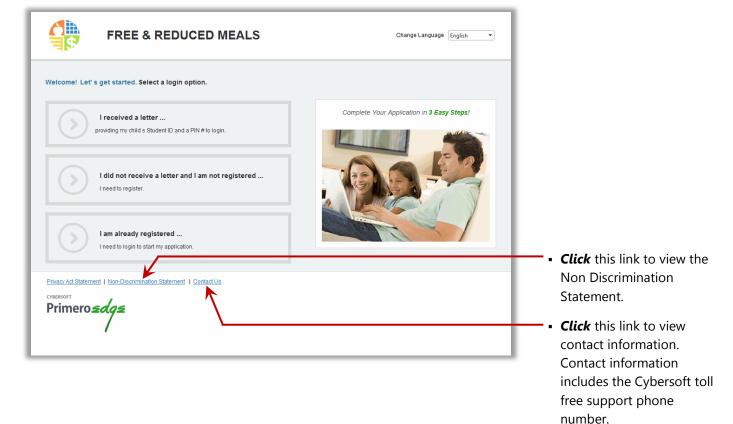


The applicant will:

- Open an Internet browser, such as Microsoft Internet Explorer.
- 2 Go to the district provided website for Free and Reduced Meals.
- 3 **See** this screen.

Reviewing the Free & Reduced Meals Screen





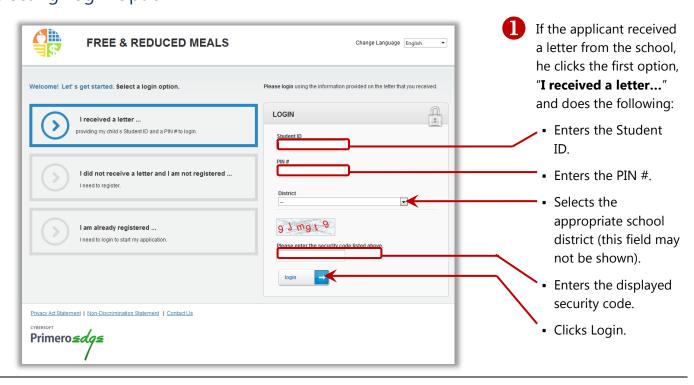
Step1: Logging In

Choosing a Login Option

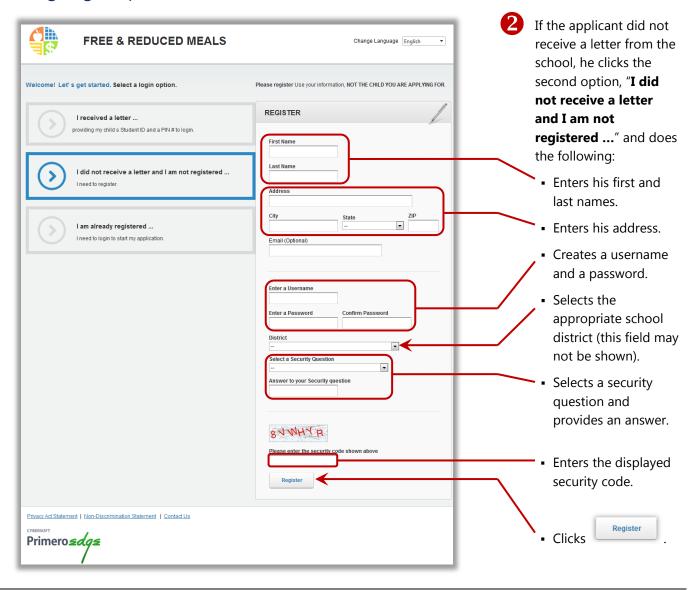


The applicant clicks one of the three options shown on the *Free & Reduced Meals* screen to start the application process.

Selecting Login Option 1



Selecting Login Option 2

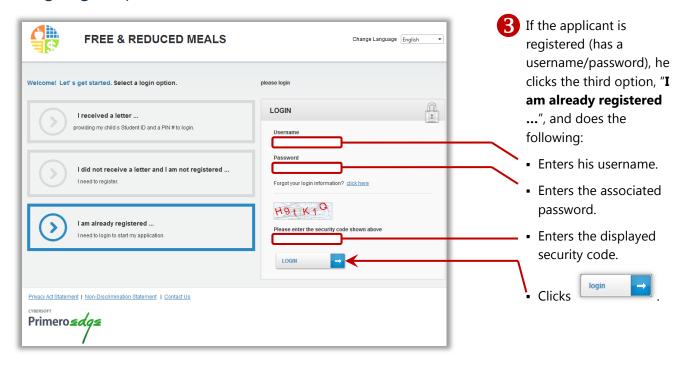


Notes:

- Creating a Username/Password allows the applicant to start a new application at a later time, if needed.
- All data is lost if:
 - 1 An application is started but not completed or submitted, and
 - 2 The applicant leaves the Free & Reduced Meals page.

In this case, the applicant clicks the third option, "I am already registered ..." and starts the application process again.

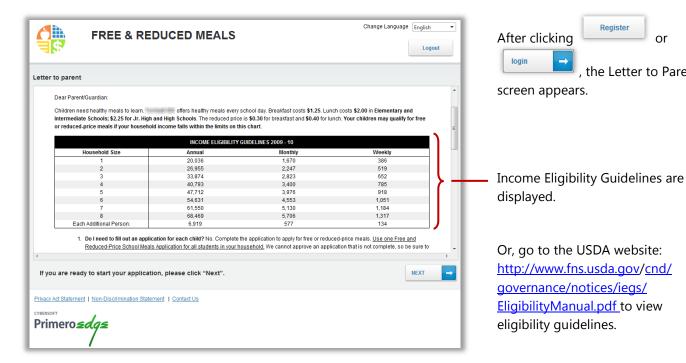
Selecting Login Option 3



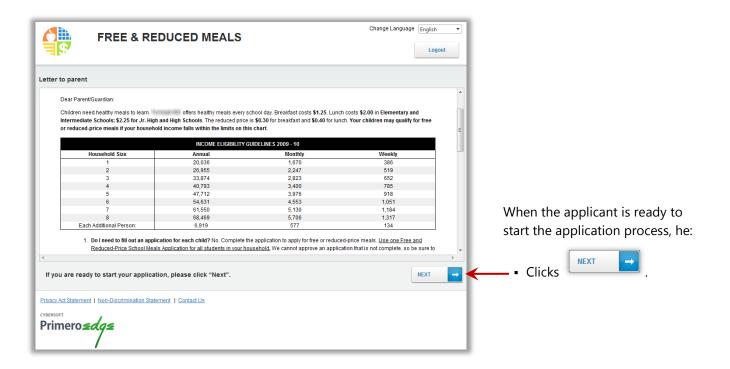
Register

, the Letter to Parent

Reviewing the Letter to Parent Screen



Continuing the Process



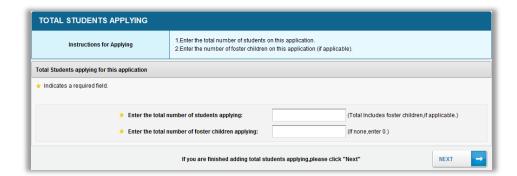
Chapter 5: Add Students to Application

In this chapter you will learn how the applicant:

- ✓ Adds all K-12 students to the application
- ✓ Adds a foster child designation
- ✓ Adds student received income
- ✓ Adds SNAP/TANF identification

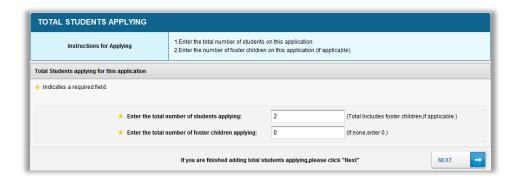
Step 2: Adding Students

For State of Georgia School Districts Only



For the state of Georgia, the online application process begins with the *TOTAL* STUDENTS APPLYING screen.

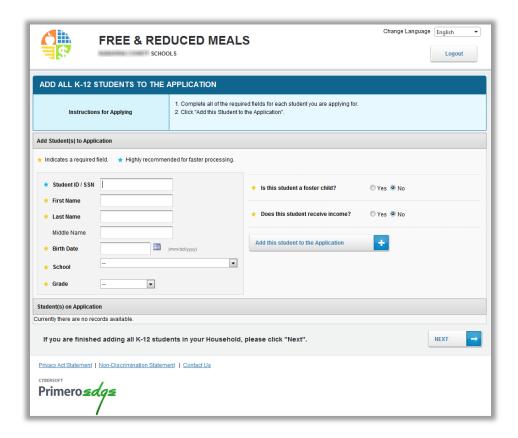
If you are not in a school district in the state of Georgia, please go to the next page.



On the TOTAL STUDENTS

APPLYING screen, the applicant:

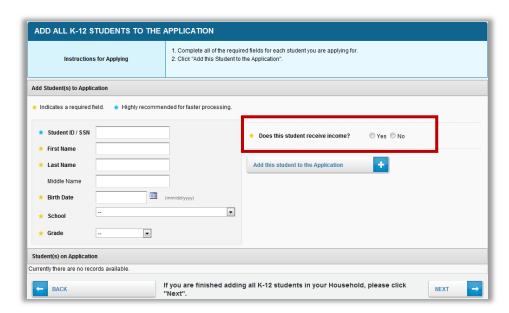
- In <u>Enter the total number of</u> <u>students applying</u>, enters a number.
- In <u>Enter the total number of</u> <u>foster children applying</u>, enters a number.
- Clicks



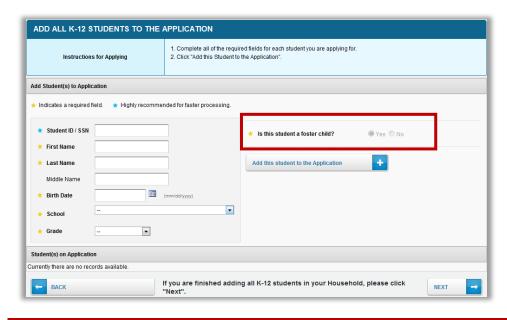
All students are added through the ADD ALL K-12 STUDENTS TO THE APPLICATION screen.

This screen asks for required (★) and optional (★) information.

For State of Georgia School Districts Only

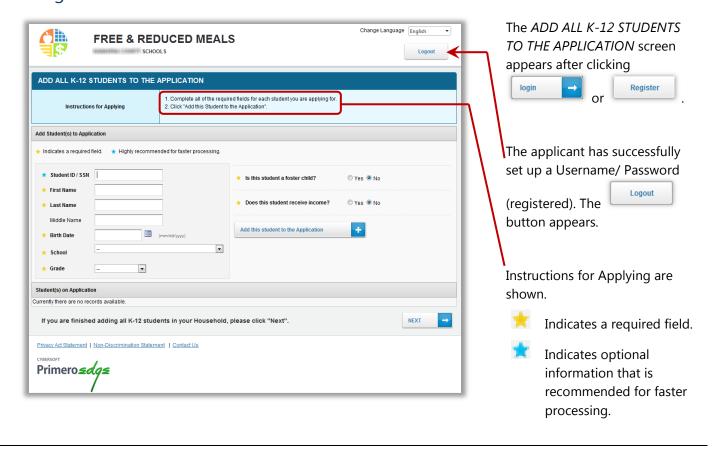


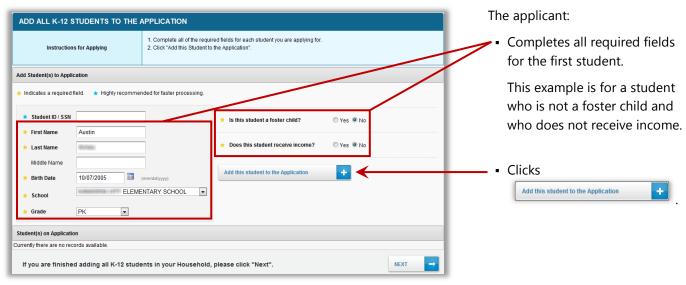
The applicant sees this screen (compare the highlighted area to the one shown on page 37) when the applicant is not registering any foster children, that is, on the *TOTAL STUDENTS APPLYING* screen, "0" (zero) was entered for the number of foster children that are applying.

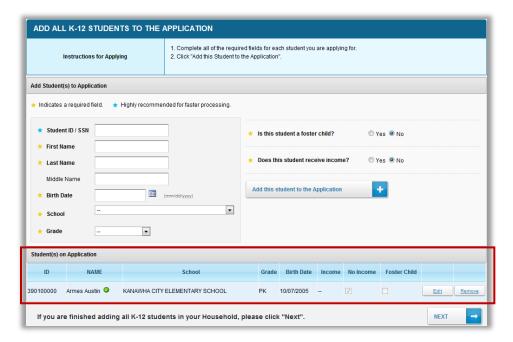


The applicant sees this screen (compare the highlighted area to the one shown on page 37) when the applicant indicates that all applying children are foster children, that is, on the *TOTAL STUDENTS APPLYING* screen, the number entered in both fields is the same.

Adding a Student





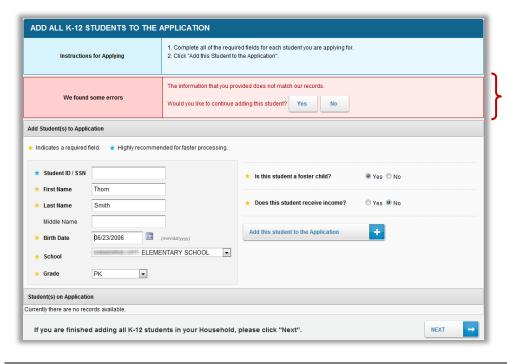


The student's information is accepted and placed in the **Student(s) on Application** list.

The applicant can:

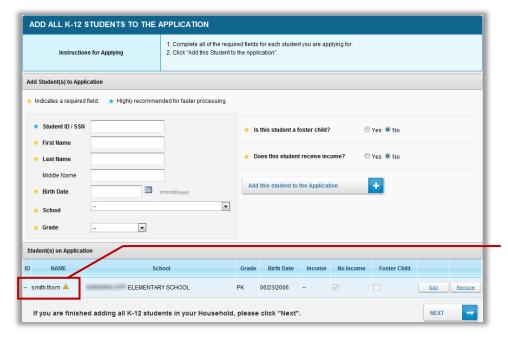
- Click to make changes to the student information.
- Click to remove the student from the application.

Handling Errors

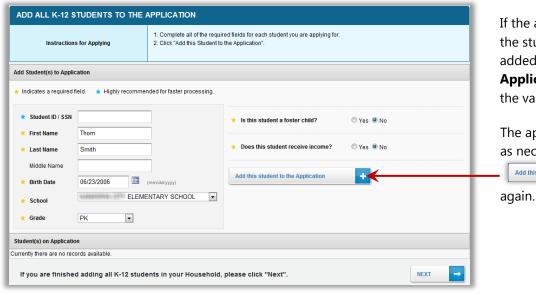


If PrimeroEdge detects any errors when adding a student, a message appears.

The applicant can choose to keep the information as is or make changes.



the student is added to the **Student(s) on Application** list with a Caution icon (beside the student name.

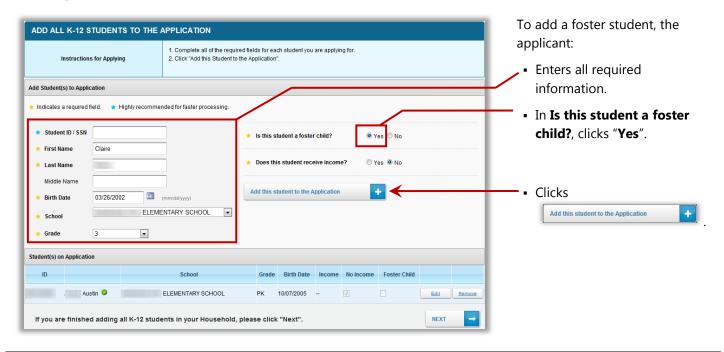


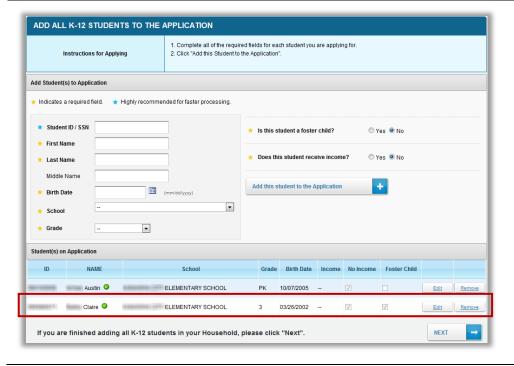
If the applicant selects the student information is not added to the **Student(s) on Application** list and remains in the various fields.

The applicant can make changes as necessary before clicking

Add this student to the Application

Adding a Foster Student



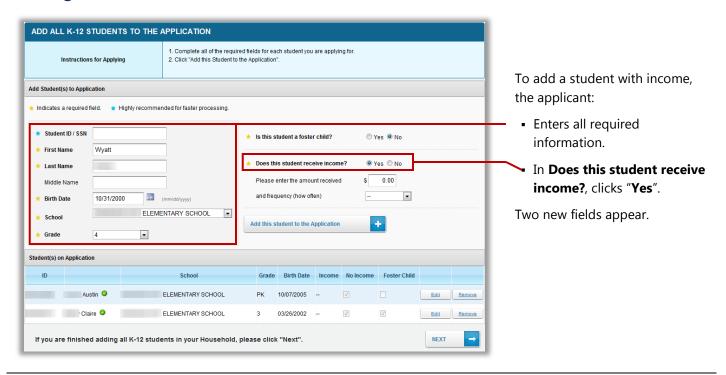


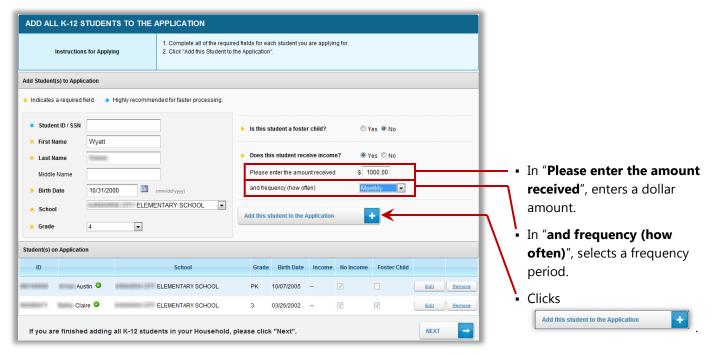
The student is added to the **Student(s) on Application** list with **Foster Child** selected.

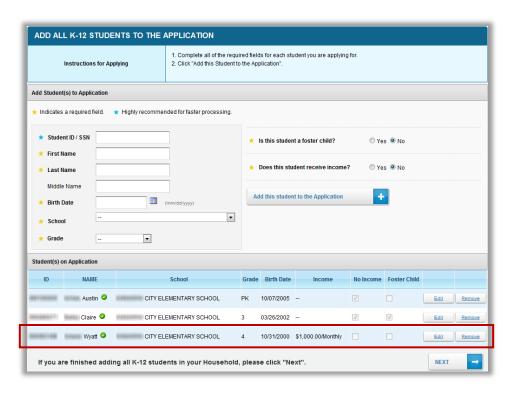
Note

Foster children can be included on the same application with non-foster children.

Adding a Student with Income







The student is added to the **Student(s) on Application** list with the received income and frequency listed in **Income**.

Last Name Middle Name

Grade

Student(s) on Application

Seth 🥝

PK

•

Jackson O ELEMENTARY SCHOOL

ELEMENTARY SCHOOL .

ELEMENTARY SCHOOL

If you are finished adding all K-12 students in your Household, please click "Next"

Choosing Yes for FOSTER

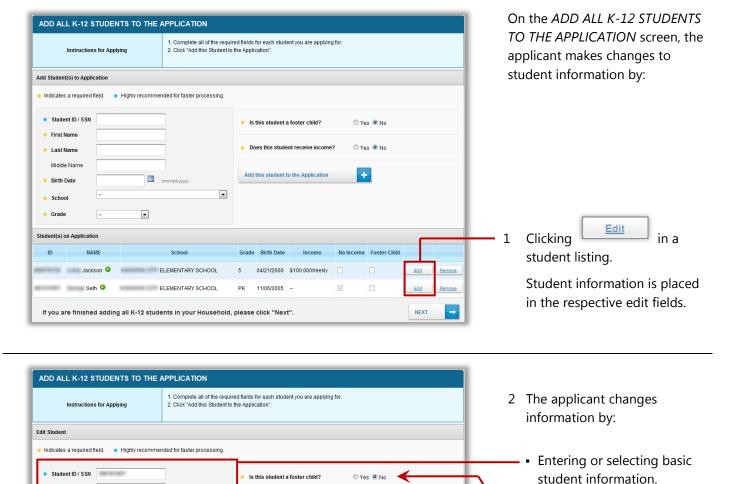
button is not available when in

status.

ONOTICE that the

Edit mode.

Changing Student Information



Does this student receive income?

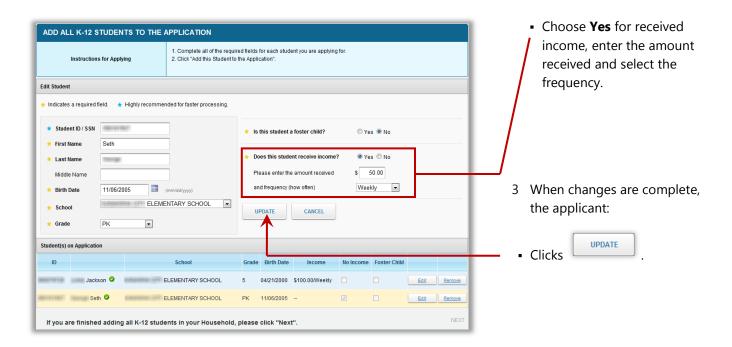
04/21/2000 \$100.00/Weekly

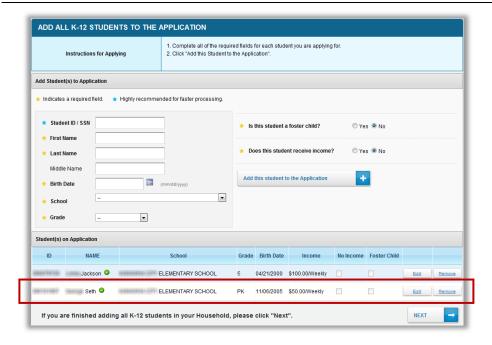
11/06/2005

No Income Foster Child

Edit Remove

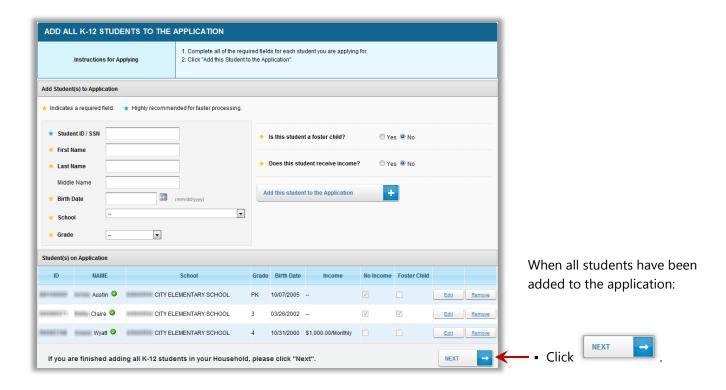
Edit Remove

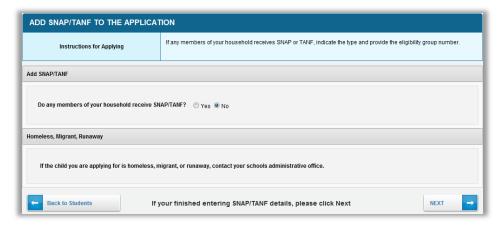




The information in the student listing is updated.

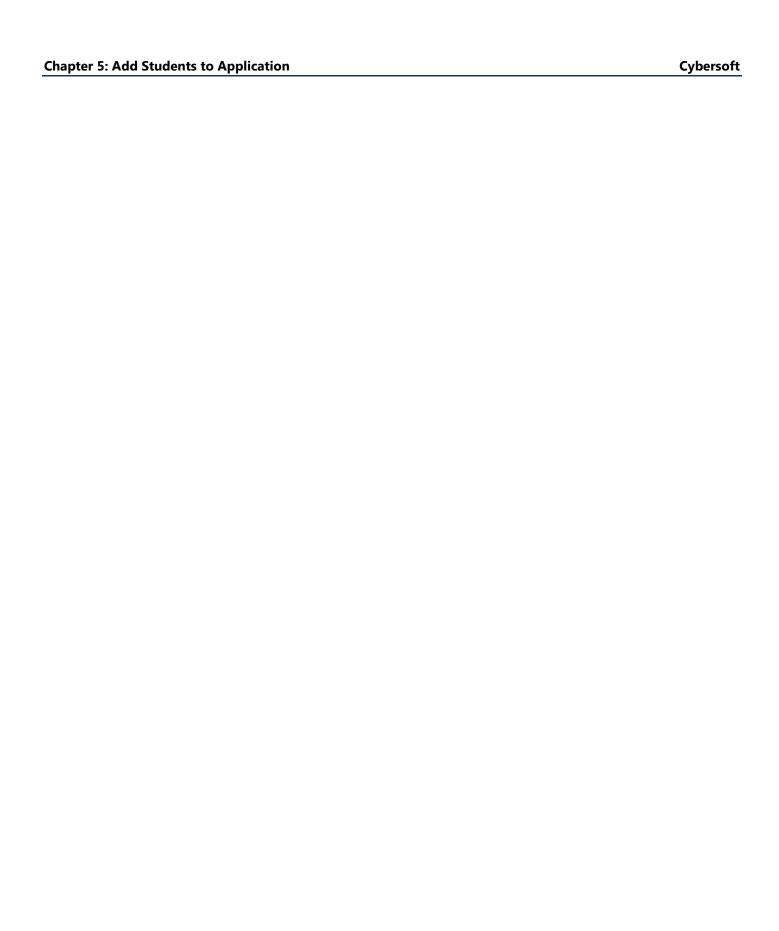
Continuing the Process





The ADD SNAP/TANF TO THE APPLICATION screen appears.

Note: If all students on the application are Foster children, the ADD SNAP/TANF TO THE APPLICATION screen is bypassed. In this case the next screen shown is the APPLICANT INFORMATION screen. Go to page 60 to continue.



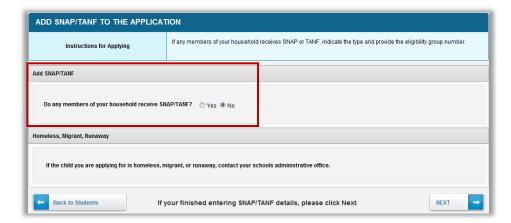
Chapter 6: Add SNAP/TANF to Application

In this chapter you will learn how the applicant:

- ✓ Adds SNAP/TANF eligibility information
- ✓ Adds Applicant information

Step 3: Adding SNAP/TANF

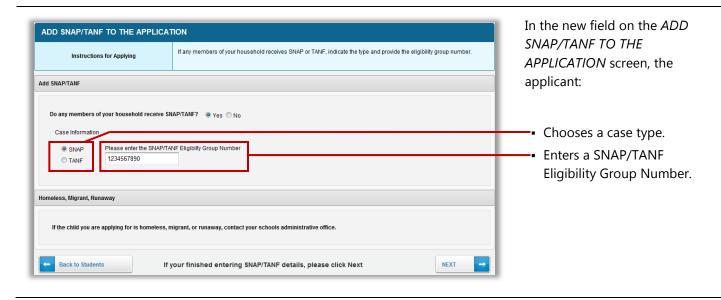
Entering a SNAP/TANF Number



On the ADD SNAP/TANF TO THE APPLICATION screen:

 If any member of the household receives
 SNAP/TANF/CALWORKS/KIN
 -GAP/FDPIR benefits, the applicant selects "Yes" in the Add SNAP/TANF group.

A new field appears with the prompt to enter the Eligibility Group Number.

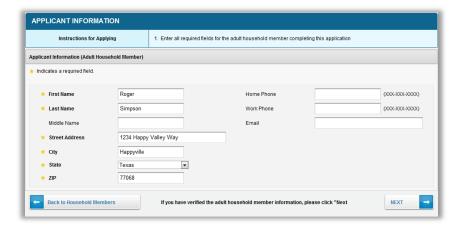


Continuing the Process



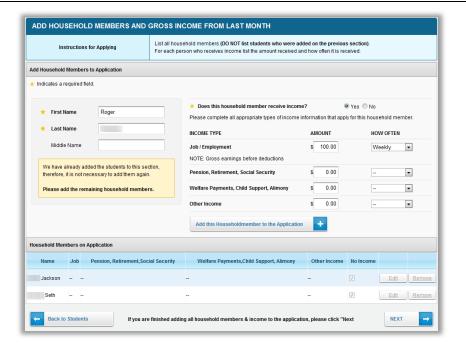
When the applicant is ready to continue the process, he:

■ Clicks



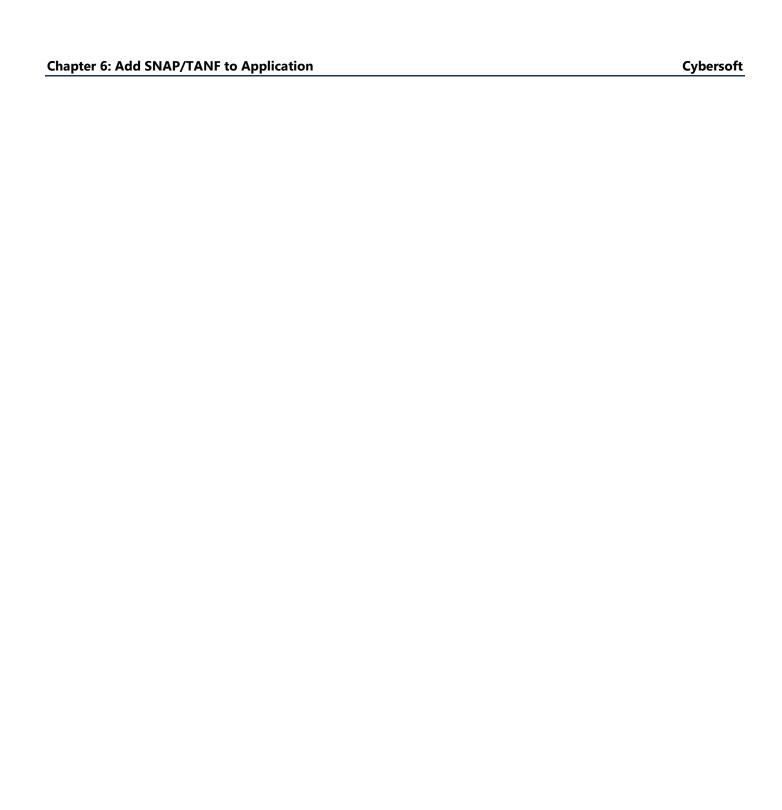
If the applicant entered a SNAP/TANF number, the APPLICANT INFORMATION screen is shown next.

 Go to page 60 for information on this screen.



If the applicant did not enter a SNAP/TANF number, the ADD HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH screen is shown next.

 Go to page 54 for information on this next step.



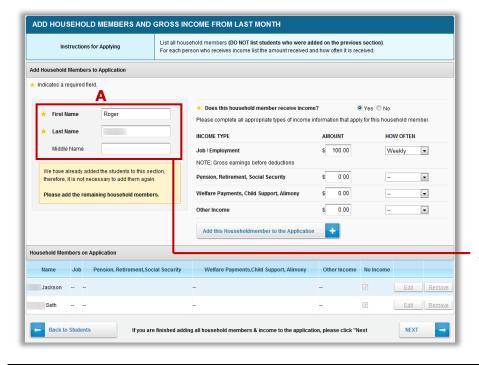
Chapter 7: Add Household Members to Application

In this chapter you will learn how the applicant:

- ✓ Adds Household Members
- ✓ Change Household Member information

Step 4: Adding Household Members

Adding Household Members

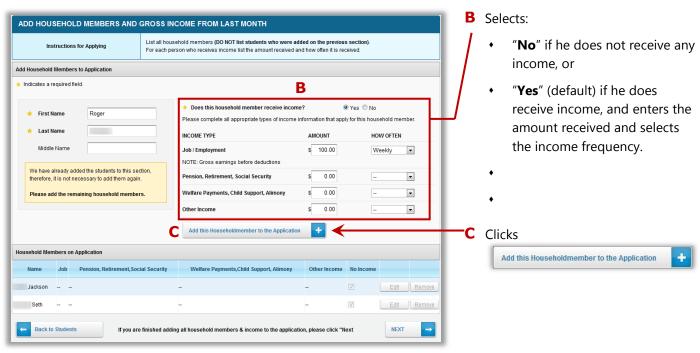


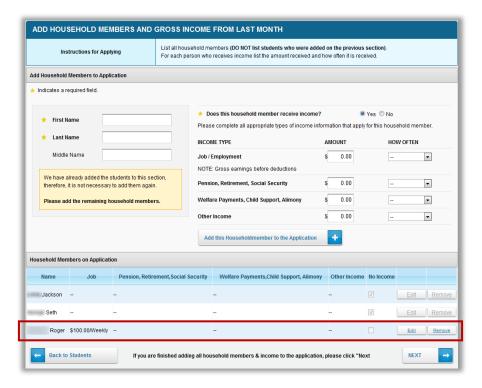
If the applicant *does not* enter a SNAP/TANF number, the *ADD* HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH screen is displayed next.

On the *ADD HOUSEHOLD MEMBERS* screen, applicant name is supplied from registration information.

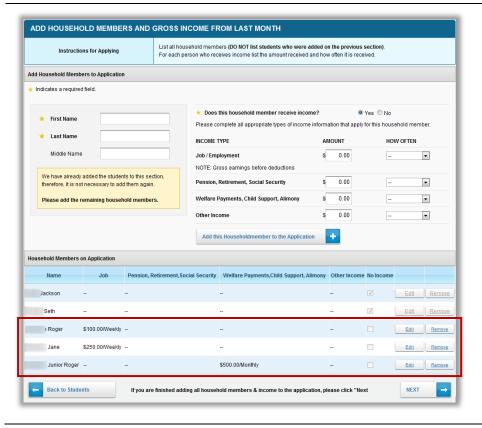
On the *ADD HOUSEHOLD MEMBERS* screen, the applicant:

A Changes or adds name information, if needed.



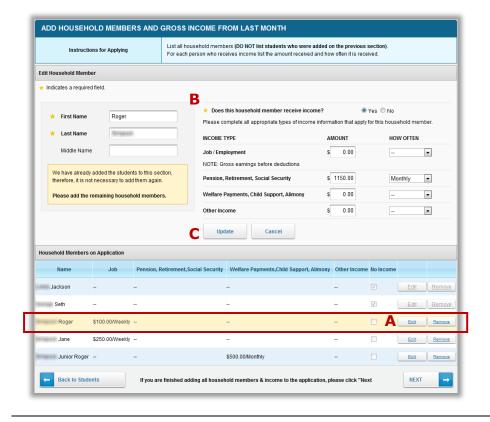


The household member appears in the Household Members on Application list.



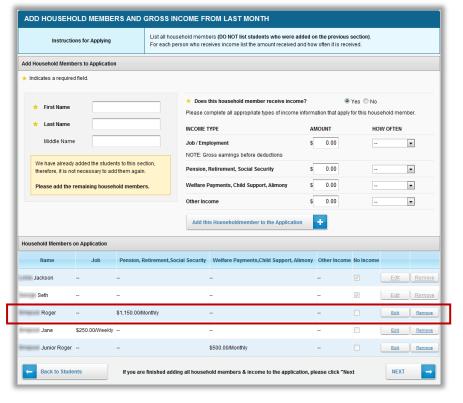
The applicant adds all other household members and includes income information for each.

Changing Household Member Information



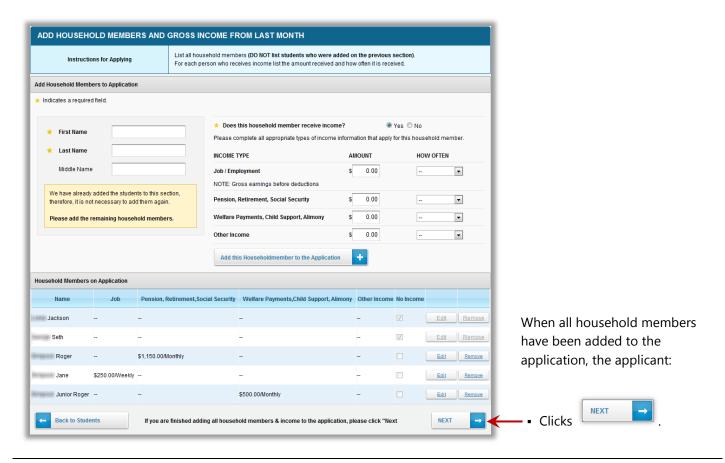
The applicant changes Household Member information by:

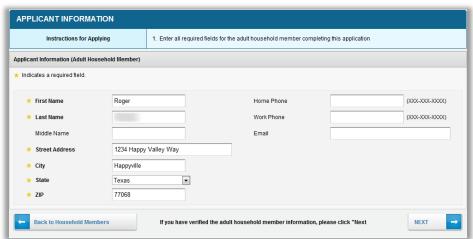
- A Clicking Edit in a member listing.
- **B** Making changes to the name(s) or income information.
- C Clicking UPDATE .



The household member listing is updated in the **Household Members on Application** list.

Continuing the Process





The APPLICANT INFORMATION screen appears with basic applicant information that was collected when the applicant registered.



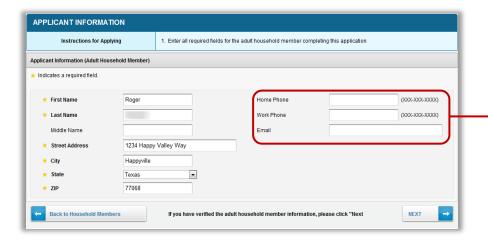
Chapter 8: Verify Applicant Information

In this chapter you will learn how the applicant:

- ✓ Verifies basic applicant information
- ✓ Supplies additional information

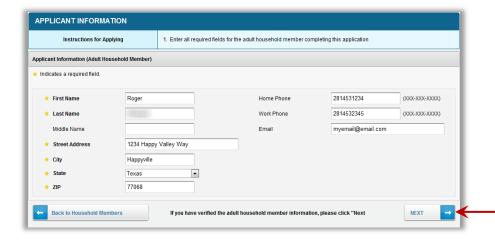
Step 5: Verifying and Reviewing

Verifying Applicant Information



On the *APPLICANT INFORMATION* screen, the applicant:

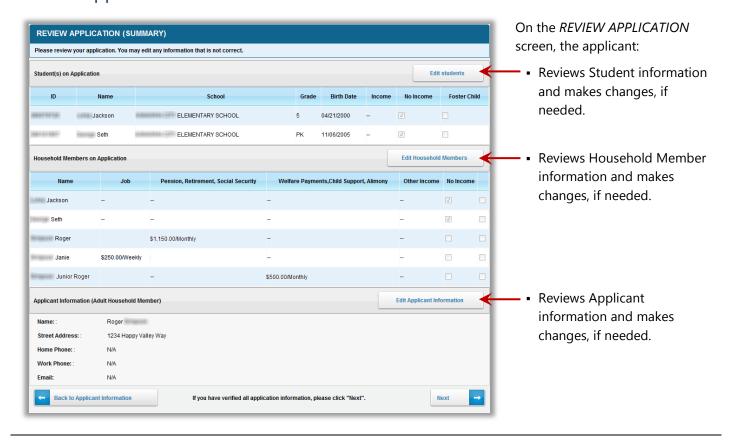
- Reviews existing data on file for the applicant.
- Enters <u>Home Phone</u>, <u>Work</u> <u>Phone</u> and an <u>Email</u> address, if desired.



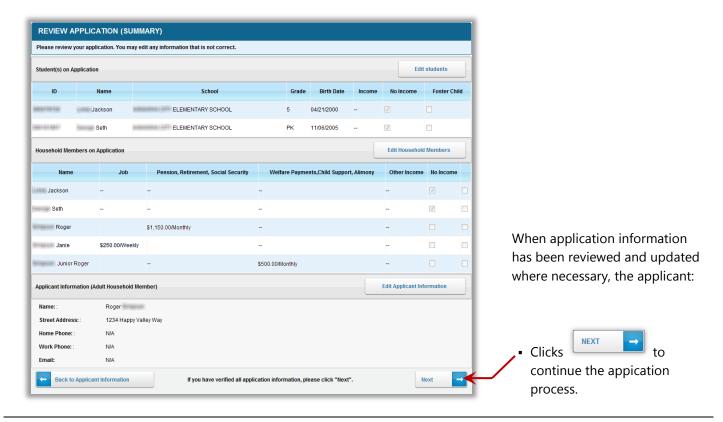
When applicant information has been verified and updated where needed, the applicant:

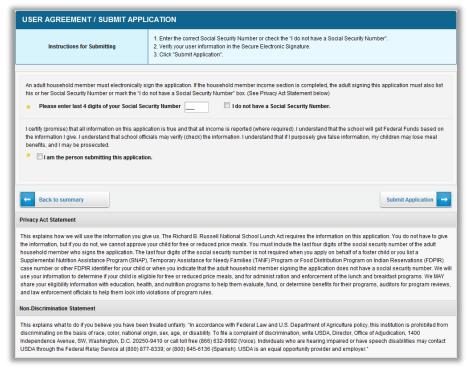
 Clicks to continue the application process.

Review Application Information



Continuing the Process





The USER AGREEMENT / SUBMIT APPLICATION screen appears.

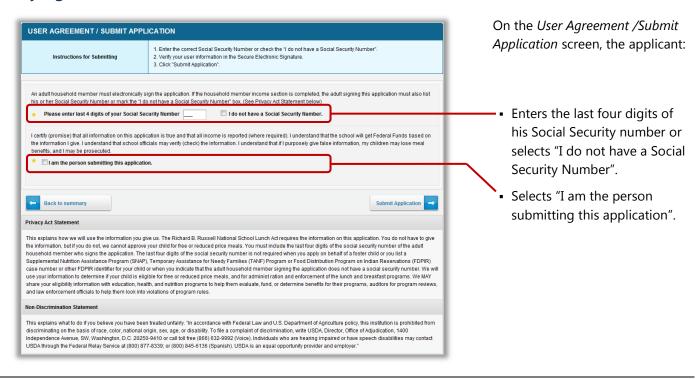
Chapter 9: Submit Application

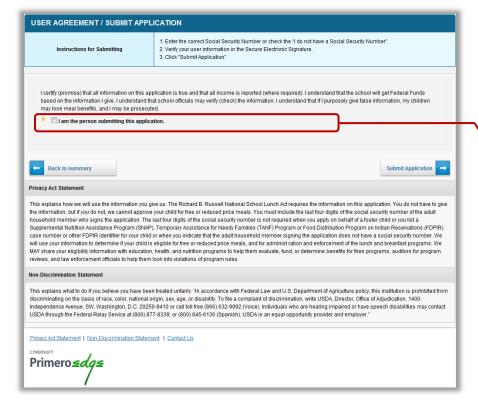
In this chapter you will learn how the applicant:

- ✓ Accepts the User Agreement.
- ✓ Submits the application.

Step 6: Submitting the Application

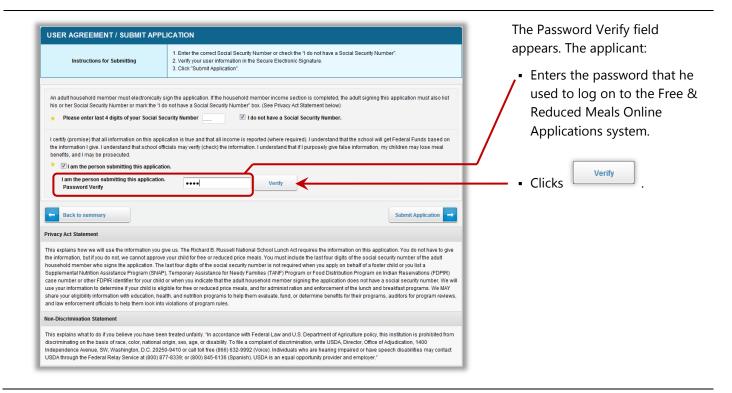
Verifying the Password

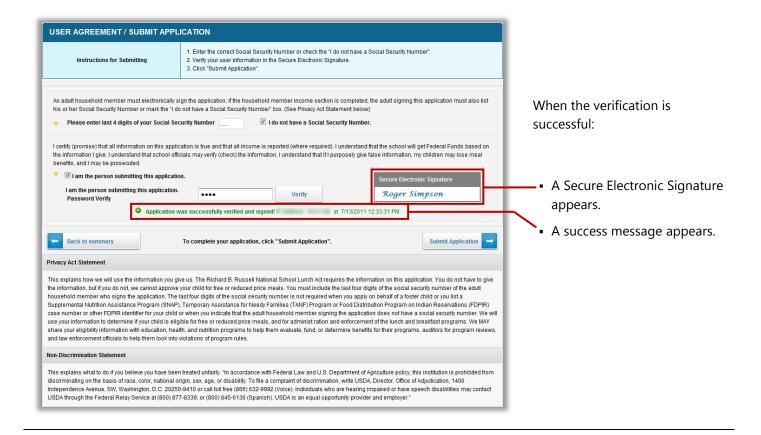




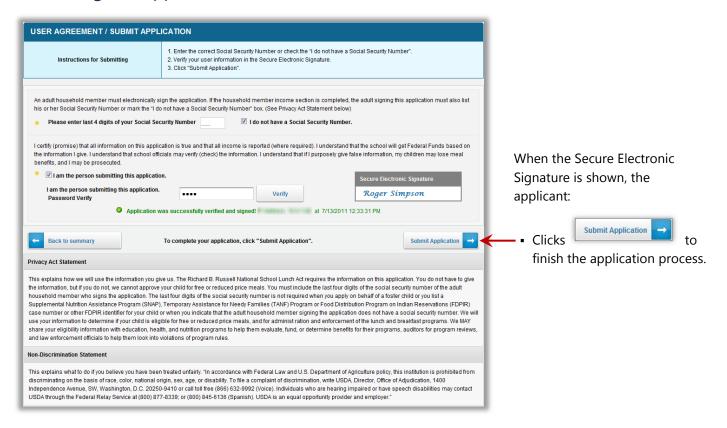
If all children on the application are foster children, the applicant is not required to provide a Social Security Number (SSN). Therefore, this screen only displays the certification (promise) section. In this case, the applicant:

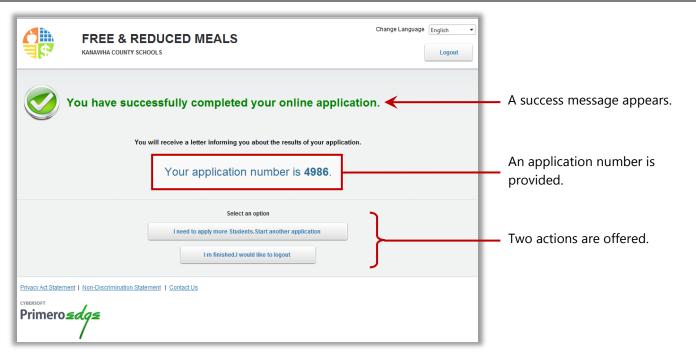
 Selects "I am the person submitting this application".





Submitting the Application





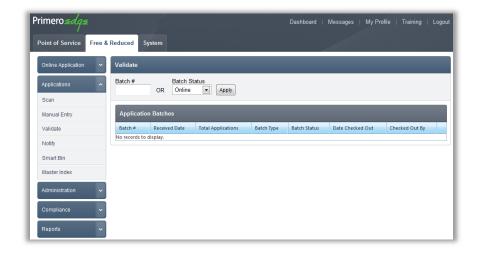
Chapter 10: Validate Free & Reduced Meals Online Applications

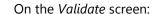
In this chapter you will learn how to:

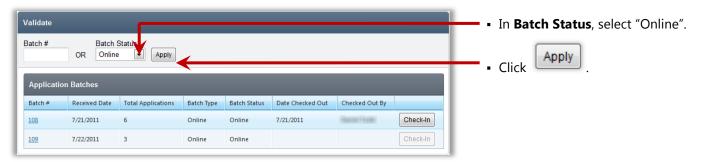
- ✓ Validate online applications
- ✓ Notify Free & Reduced Meals Online Applications applicants

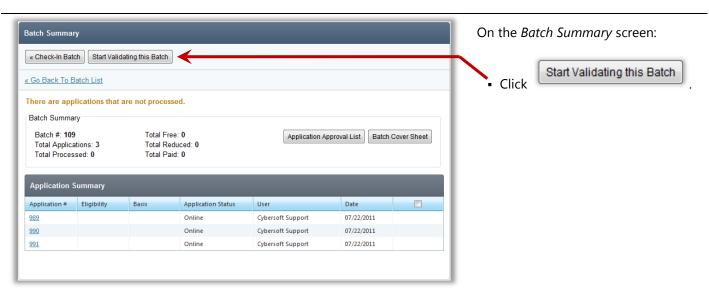
Validate Online Applications

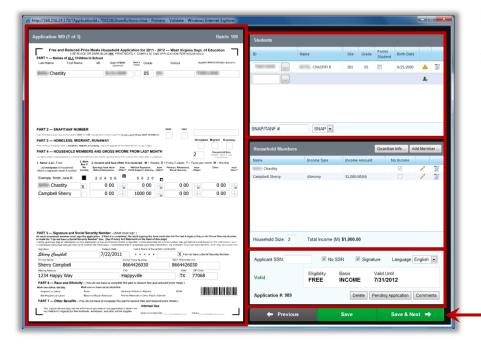
Validating Free & Reduced Meals Online Applications











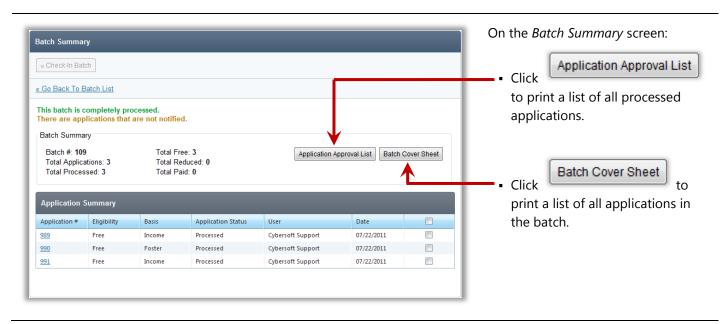
In the *Validation Workspace*, process all applications in the batch just as you would for scanned applications:

- Verify the application image information with the information listed in:
 - Students
 - Household Members
 - Application Details
- Make changes as needed.

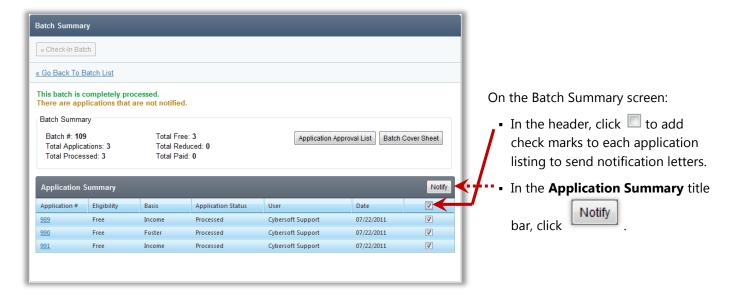


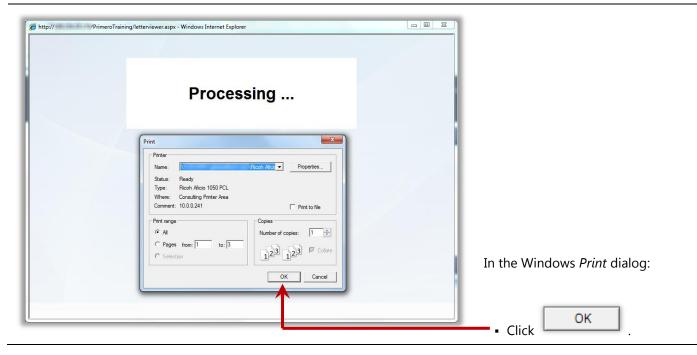
The next application in the batch appears.

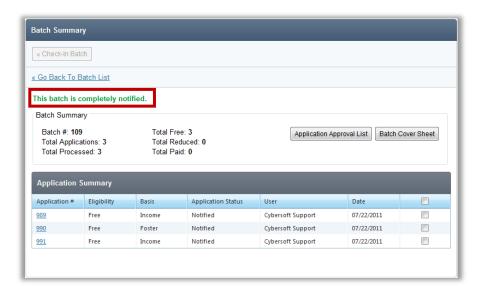
When all applications in the batch have been processed, the *Batch Summary* screen appears.



Notifying Free & Reduced Meals Online Applicants

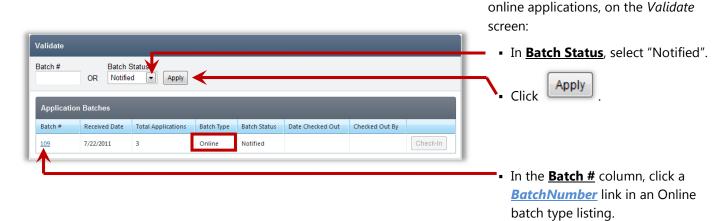


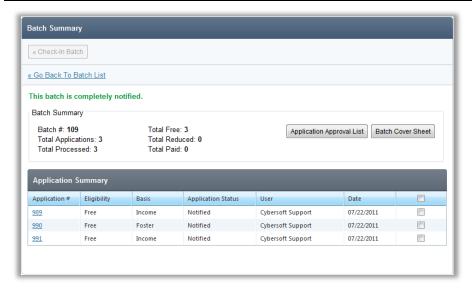




A message appears to let you know that all applications in the batch have been processed and notified.

To see the processed and notified





All processed and notified online applications in the batch are listed.